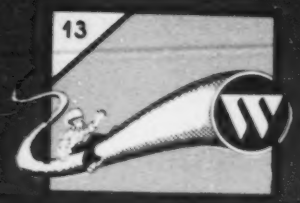

- Denver report fails to clear franchise air
- Blue skies predicted for The Weather Channel
- Montgomery County deluged by MSOs
- Complete Texas show exhibitors' guide

C8920-2

CableVision

The news and features weekly of the cable television industry

February 15, 1982

CVFL20014CON452 05/30/82-2
CONGRESSIONAL INFO SERVICE
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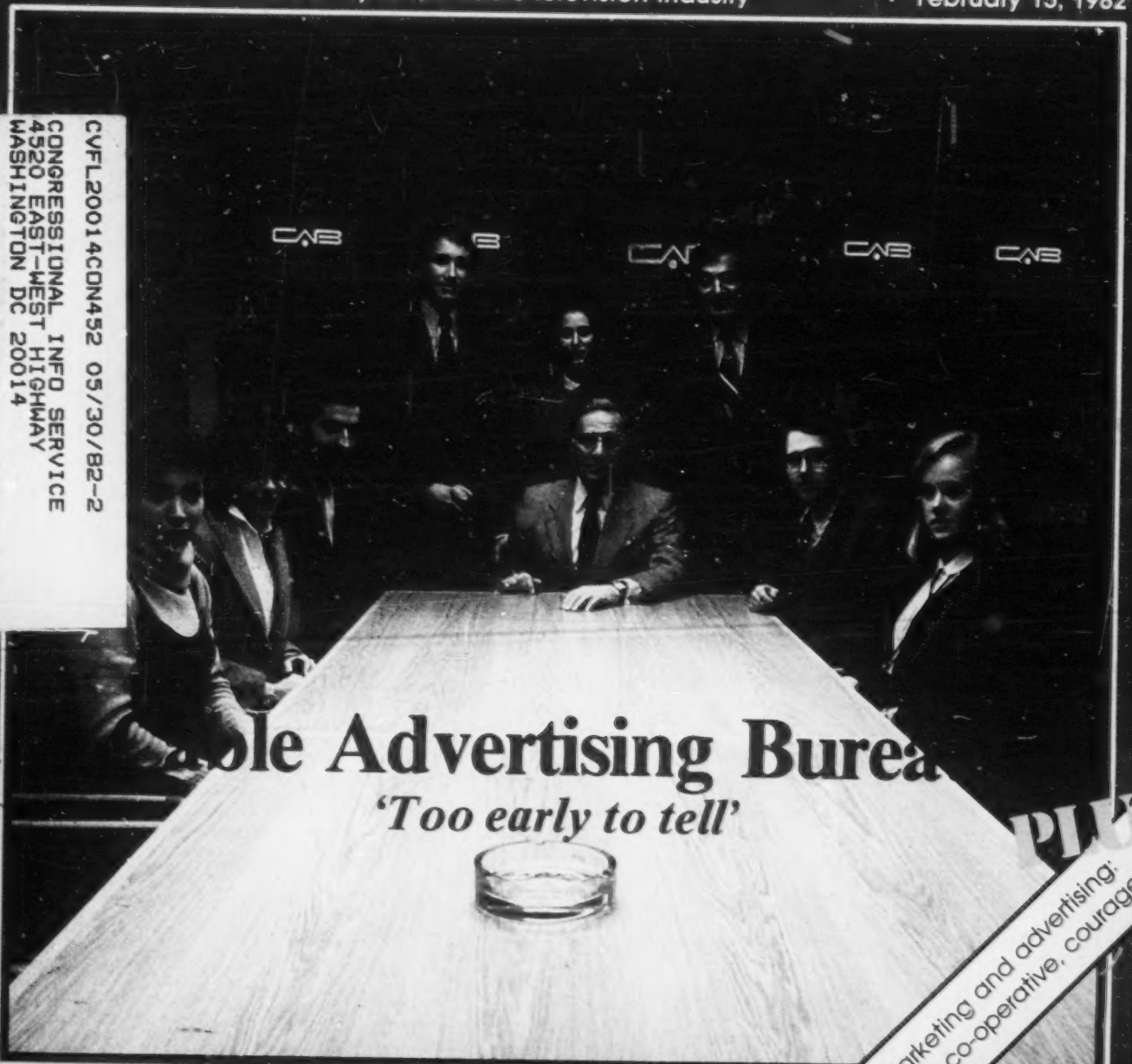
WASHINGTON DC 20014



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'Too early to tell'

PLUS

Marketing and advertising: Cultural, co-operative, courageous

BEST AVAILABLE COPY

CableVision | Volume 7, Number 23. February 15, 1982

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Member of the Audit Bureau of Circulations.

On the cover

From temporary office space to a suite in a brand new building, Bob Alter and the CAB have come a long way in eleven months. CAB hosts its first annual industry convention February 9. **Page 29.**

Report tightens fight

The final evaluation of Denver's three cable franchise bids has resulted in some reversals of previous endorsements. The concluding edge of the report honed in on the fact that no one firm has any real advantage over the others. **Page 13.**

The Weather Channel

Weather or not

When The Weather Channel debuts on May 2, John Coleman and his staff are ready to provide 24-hour weather forecasts over a specially-designed decoder called the Weather STAR (Satellite Transponder Addressable Receiver). **Page 19.**

Strategy revised

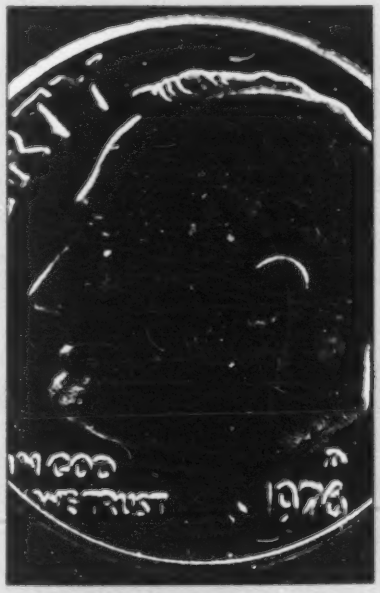
ANCCI has modified its retailing strategy to give its five-month-old Video Shopper venture a new lease on life. **Page 31.**

Revenues soar

FCC figures indicate operating revenues for the cable industry totaled more than $2.2 billion in 1980, a 23 percent increase over 1979. **Page 73.**

Texas show

The complete list of exhibitors at the 22nd annual convention of the Texas Cable TV Association has been assembled for your reading convenience. The Feb. 17-19 show at the San Antonio Convention Center has a full agenda of activities, which has been provided also. **Pages 63 and 83.**



This week in *CableVision Plus*

This week, *CableVision Plus* examines the rumors swirling around CBS Cable's pay/basic pirouette. Editor Jeri Baker examines the economic and programming elements unique to cultural services. Continuing the marketing-advertising theme, early advertisers on cable assess what they got: positive public relations, cable knowledge and what was simply a good buy. Finally, *CV Plus* takes a look at co-op advertising, a potential cable gold mine, largely unclaimed because of a poor accounting system. **Pages 39-62.**

Facts and figures

Cable industry revenues soar 23 percent in 1980, FCC reports

WASHINGTON—According to figures released by the Federal Communications Commission, operating revenues for the cable industry totaled more than $2.2 billion in 1980. That amount represents a 23 percent increase over the revenues accrued in 1979.

Each year at this time, the FCC releases a comprehensive report on the cable industry's financial status (*CV*, 1/11/82, p.9). However, because of the FCC's reporting procedures, the information is always one calendar year behind the present. Despite the lag, the information can be useful when contrasted with information from the preceding years (see chart).

In 1980, total operating expenses were $1.4 billion, which left an operating income of $799 million. This is a 35.7 percent operating margin before expenses.

Net income before taxes was approximately $168 million and the cable industry's total assets had a value of $4.44 billion. The last figure is an increase of 38 percent from 1979.

The FCC figures are based on filings representing 96 percent of all cable subscribers in the country. The remaining four percent subscribe to systems that had "incomplete, inaccurate or delinquent" filings. National totals were extrapolated from the available data.

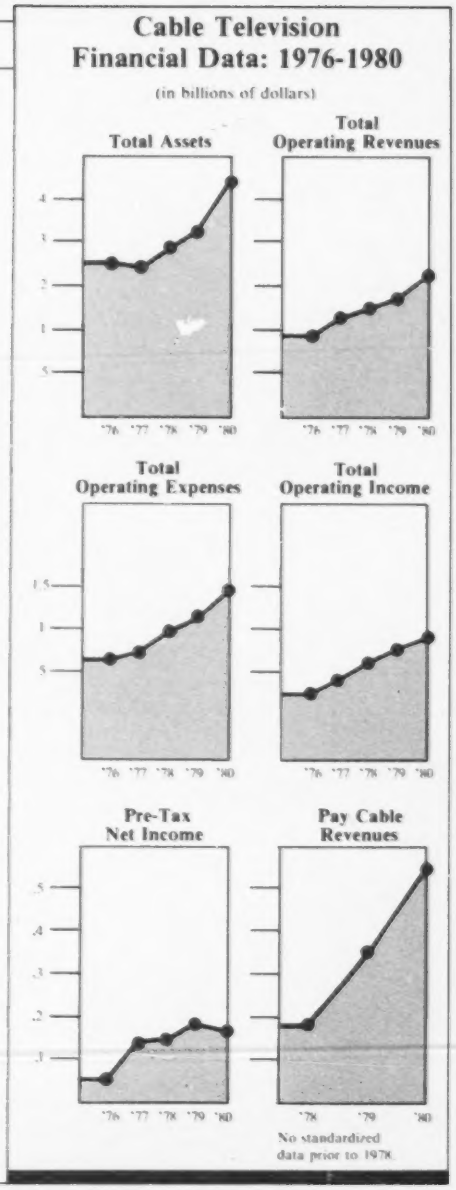
More than 16 million cable households are represented in the 1980 figures, with cable systems in 8,600 communities. For reporting purposes, the 8,600 communities were consolidated into about 3,000 financial entities, which are defined as "one or more cable TV community systems that report to the commission as one business entity."

The FCC said the average financial entity had approximately 5,900 subscribers and average operating revenues of $780,300 in 1980.

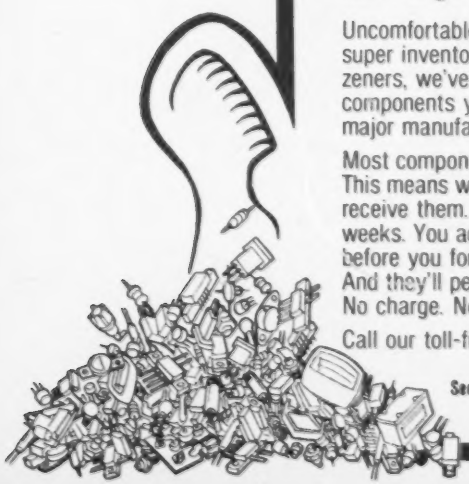
Of the total 1980 revenues, pay cable services accounted for $575 million, or 25.7 percent. This figure is an increase of 6.1 percent over 1979 revenues.

The report figures indicated that Alaska was not an ideal state for bargain-conscious cable subscribers. The largest state had the highest average monthly rate for basic service, $24.76, and pay service, $13.36.

The national average for basic service was $7.69. Vermont had the lowest rate of $6.37. Pay television averaged $9.13 per service each month. The Virgin Islands captured the bottom spot with a $6 pay rate. National installation fees averaged $17.66. Installation rates ranged from $10 in Rhode Island to $40 in the Virgin Islands.



We've got replacement components coming out of our ears . . .



Uncomfortable maybe, but it makes for one super inventory. From attenuators to zeners, we've got the replacement components you need — for over thirty major manufacturers and all in one shop.

Most components are on our shelves now. This means we fill most orders the day we receive them. No waiting four to five weeks. You actually get your components before you forget why you ordered them. And they'll perform, or we'll replace them. No charge. No hassle.

Call our toll-free number, **800-327-6690**, and ask for your favorite component. Or ask for our free, 66-page Replacement Components Catalog. Read it over — it may not move you to tears, but it could be good for your system.

While you're at it, ask for our "Winter Specials" bulletin, featuring price reductions on a number of top-grade components.

For additional information, call or write Broadband Engineering, Inc., P.O. Box 1247, Jupiter, Florida 33458.

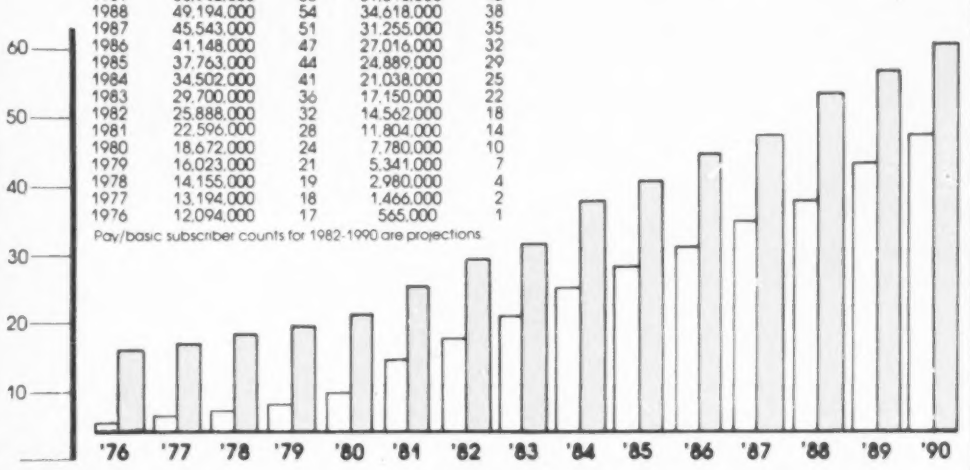
See us at the Texas Show - Booth No. 257.

BROADBAND
A SUBSIDIARY OF AUGAT

Pay/basic cable growth

Year	Basic Subscribers	% of TVHHs	Pay Subscribers	% of TVHHs
1990	57,812,000	61	43,596,000	46
1989	53,882,000	58	39,018,000	42
1988	49,194,000	54	34,618,000	38
1987	45,543,000	51	31,255,000	35
1986	41,148,000	47	27,016,000	32
1985	37,763,000	44	24,889,000	29
1984	34,502,000	41	21,038,000	25
1983	29,700,000	36	17,150,000	22
1982	25,888,000	32	14,562,000	18
1981	22,596,000	28	11,804,000	14
1980	18,672,000	24	7,780,000	10
1979	16,023,000	21	5,341,000	7
1978	14,155,000	19	2,980,000	4
1977	13,194,000	18	1,466,000	2
1976	12,094,000	17	565,000	1

Pay/basic subscriber counts for 1982-1990 are projections.



Cable barometer

Television households (TVHH) ... 80,700,000

Homes passed by cable (HP) 41,574,977

Percent of TVHH passed by cable 51.52%

Basic cable subscribers 22,596,000

Percent of TVHH with basic cable .. 28.00%

Percent of HP with basic cable .. 54.35%

Pay cable subscribers 11,804,000

Percent of TVHH with pay cable 14.62%

Percent of HP with pay cable 28.39%

Percent of basic subs with pay cable 52.24%

Cable services' subscriber counts

Basic Cable Services (television)*	Affiliates	Subscribers	% Change in Homes From 12/31/81
ACSN	212	1,385,628	+0.31
AETN (as of 12/31)	285	2,681,478	N.C.
BET	812	8,952,320	+0.75
CBN	3,300	14,700,000	N.C.
CBS Cable	250	3,000,000	N.C.
Christian Media Network (as of 12/31)*	193	1,800,000	+38.46
CNN	1,953	11,033,500	+3.42
CNN2 (as of 12/31)	N.A.	780,000	N.C.
C-SPAN	1,200	11,000,000	+4.76
Episcopal Television Network	72	1,047,000	N.C.
ESPN	3,189	14,138,373	+3.89
Eternal Word Television Network	23	300,000	N.C.
MSN	541	4,100,000	N.C.
MTV (as of 1/1)	300	2,500,000	N.C.
National Christian Network	25	302,434	+0.87
National Jewish Television	73	1,661,075	+2.11
Nickelodeon/ARTS (as of 1/1)	1,350	6,200,000	N.C.
North American Newstime	115	884,000	N.C.
PTL	465	4,600,000	+9.52
SIN**	160	2,772,500	N.C.
SPN	414	3,658,904	+4.29
Trinity	140	1,271,562	N.C.
USA Network	1,750	10,000,000	+5.26
WGN	2,353	7,869,703	+4.27
WOR	1,226	4,705,350	+2.12
WTBS	3,869	19,560,000	+9.00
Basic Cable Services (audio)			
Lifestyle	30	300,000	N.C.
WFMT	109	659,093	+1.54
STV Programming			
SelecTV Programming (as of 12/31)	11	235,888	+4.84
Pay Cable Services (television)			
Bravo (as of 12/31)	25	47,000	N.C.
Cinemax	600	1,000,000	+42.86
Escapade/Playboy (as of 12/31)	90	185,000	N.C.
GalaVision	122	95,000	+3.26
HBO	3,300	8,500,000	+5.88
Home Theatre Network (as of 12/31)	275	155,000	+3.33
Private Screenings***	11	127,000	N.C.
Showtime (as of 12/31)	1,300	2,850,000	+2.14
The Movie Channel (as of 1/1)	1,500	1,750,000	N.C.

Announced Satellite-Fed Cable Services	Projected Launch Date
Black Music Cable Channel	third quarter 1982
The Buena Vista Channel	to be announced
Cable Health Network	first quarter 1982
Cable Newspaper Corporation	second quarter 1982
Cinemerica	mid-1982
Chromatic Animation	fall 1982
Daytime	3/82
Delta (ABC/Getty)	spring 1982
The Disney Channel	first quarter 1983
EROS	4/82
Family Programming Network (Billy Batts)	T.B.A.
Heartbeat Media Network	third quarter 1982
The Health Channel	3/82
Home Music Store (audio)	second quarter 1982
Home Theatre Network Plus	3/82
Kid Vid Network	second quarter 1982
Lewmark Productions Music Channel	T.B.A.
LVEN	T.B.A.
Nashville Network	3/83
National Jazz Network (audio)	4/82
Nostalgia Network	T.B.A.
Penthouse Entertainment Network	T.B.A.
RCTV/Entertainment Channel	6/82
Satellite News Channels (channel one)	summer 1982
Satellite News Channels (channel two)	fourth quarter 1982
SPN/international network	second quarter 1984
SPN/financial-religious network	second quarter 1984
SPN/classic movie service	second quarter 1984
SPN/how-to network	second quarter 1984
Spanish Universal Network	T.B.A.
Spotlight	T.B.A.
Times Mirror Shopping Channel	T.B.A.
UTV Cable Network	second quarter 1982
Video Concert Hall (relaunch)	T.B.A.
The Weather Channel	second quarter 1982
Window	T.B.A.

Note: Subscriber and affiliate figures as of 1/31/82, unless otherwise noted.
*Temporarily off the air, pending transponder time.
**Estimated Spanish-speaking households; includes broadcast stations and translators. Total SIN reach: 21,393,400.
***Includes STV outlets.
N.A. designates not available.
N.C. designates no change.

Top 100 MSOs

Rank	Multiple System Operator	Subscribers
1	American Television and Communications	1,810,000
2	Teleprompter/Westinghouse	1,639,990
3	Tele-Communications, Inc. (3/81)	1,277,000
4	Cox Cable Communications, Inc.	1,098,663
5	Warner Amex Cable Communications, Inc.	850,000
5	Storer Cable Communications	850,000
7	Times Mirror	667,497
8	Newhouse Broadcasting*	5[illegible]7,452
9	Viacom Cablevision**	5[illegible]6,000
10	UA-Columbia Cablevision	4[illegible]6,121
11	United Cable Television Corporation	455,018
12	Continental Cablevision	449,547
13	Sammons Communications	443,708
14	TeleCable Corporation	295,500
15	Cablecom General/Capital Cities	289,739
16	General Electric Cablevision Corporation	287,000
17	Heritage Communications	238,451
18	Cablevision Systems Development	219,164
19	Comcast Corporation	212,677
20	Liberty Communications (9/81)	208,298
21	Daniels & Associates, Inc.	201,000
22	Tele-Media Corporation	197,000
23	Wometco Cable TV	194,944
24	Service Electric Cable TV	189,500
25	Midwest Video Corporation (8/81)	174,349
26	Maclean Hunter*	168,868
27	Century Communications	165,000
28	TCA Group	161,000
29	Multimedia Cablevision, Inc.	150,737
30	Western Communications Inc.	149,000
31	Jones Intercable, Inc.	143,159
32	Colony Communications	141,911
33	Prime Cable	125,126
34	Harris Cable Corporation	110,000
34	Communications Service, Inc. (8/81)	110,000
36	Centel Communications	106,808
37	Rollins Cable Vue, Inc.	106,800
38	Tribune Company Cable	104,137
39	Plains Communications (recently acquired by TCI)	91,000
40	Harron Communications Corporation	89,093
41	Buckeye Cablevision	86,154
42	Cable Vision Industries	83,674
43	Armstrong Utilities*	83,363
44	Cabientertainment	77,073
45	Multi-Channel TV Cable Company (8/81)	75,000
46	Palmer Communications	72,348
47	McDonald Group	72,136
48	Adams-Russell Company	67,500
49	Alda Group	67,351
50	King Videocable Company	65,144
51	Buford Television, Inc.	64,395
52	Omni Cable TV Corporation	64,107
53	Perry Cable TV Corporation (9/81)	62,000
54	Summit Communications	61,765
55	Omega Communications	60,000
56	WEHCO Video	57,143
57	Televents (9/81)	55,046
58	National Telecommunications Company	54,600
59	U.S. Cablesystems	54,174
60	Pencor Services, Inc.	53,599
61	Southern Oregon Cable TV (7/81)	52,000
62	Booth Communications	51,065
63	The Essex Group	50,613
64	Consolidated Cable Systems	50,104
65	Cable America	47,500
66	Communications Systems, Inc. (7/81)	45,172
67	US Cable Corporation (7/81)	45,000
68	Acton Corporation	44,000
69	Sonic Cable TV (7/81)	43,642
70	Clear TV Cable Corporation	43,400
71	Cross Country Cable (pending sale of NJ systems)	43,258
72	Falcon Communications	43,000
73	UltraCom, Inc. (8/81)	42,754
74	Coaxial Communications (8/81)	42,000
75	Cable TV of Puget Sound (includes bulk dwellings)	41,856
76	Adelphia (8/81)	41,828
77	Nor-Cal Cablevision (McClatchy-Viacom)	40,099
78	The Daily Press	40,000
78	Greater Media	40,000
78	Lenfest Group	40,000
81	Susquehanna Broadcasting	39,800
82	Total TV, Inc.	39,122
83	McCaw Communications	37,700
84	Oak Communications (8/81)	32,644
85	Joseph S. Gans	32,590
86	Six Star Holding Company	30,000
87	Selkirk Communications	29,000
88	Commonwealth Cable of Massachusetts	27,773
89	Hellicon Corporation	27,753
90	Fetzer Cablevision (7/81)	26,000
91	Lawrence Flinn, Jr.	25,578
92	Cable Holdings, Inc.	25,000
92	Midcontinent Cable Systems (7/81)	25,000
94	Karnack Corporation	24,696
95	Gulf Coast Cable Television Ltd. (8/81)	24,568
96	Gerity Cablevision (7/81)	24,250
97	Potomac Valley TV Company (9/81)	24,089
98	Columbia Communications Corporation (8/81)	23,655
99	Harmon & Company	23,000
100	American Cable Television, Inc.	22,281

Note: Subscriber counts in these charts are as of 12/31/81 unless noted otherwise.
*Newhouse Broadcasting includes MetroVision, NewChannels, Vision Cable. Maclean Hunter includes Metro, Suburban, Wayne Cable. Armstrong Utilities includes Armstrong Communication Corporation, National Cable TV Corporation, and North Lauderdale Cablevision.
**Viacom Cablevision includes 40% ownership in Nor-Cal Cable.

Top 100 systems

Rank	Location	Operator	Subscribers
1	San Diego, CA	Cox Cable	210,590
2	Manhattan, N.Y.	ATC	153,800
3	Oyster Bay (Long Island), NY	Cablevision Systems Development	(9/81) 140,000
4	West Orange, NJ	Maclean Hunter Cable	(8/81) 114,626
5	Los Angeles, CA	Teleprompter	103,500
6	Wayne, NJ	Rogers UA Cablesystems	100,365
7	Tulsa, OK	United Cable TV	96,668
8	Erie County, NY	Prime Cable	92,778
9	San Jose, CA	Gill Industries	89,175
10	San Antonio, TX	Rogers UA Cablesystems	85,475
11	Audubon, NJ	NYT Cable	84,610
12	Tidewater, VA	Cox Cable	80,559
13	Central Islip, NY	Viacom	80,291
14	Austin, TX	ATC	80,000
15	Honolulu, HI	ATC	79,000
16	Orlando, FL	ATC	76,100
17	Manhattan, NY	Teleprompter	69,800
18	Toledo, OH	Buckeye Cablevision	68,405
19	Wilmington, DE	Rollins Cablevision	68,038
20	Grand Rapids, MI	General Electric	67,900
21	Seattle, WA	Teleprompter	67,100
22	San Diego, CA	ATC	60,600
23	San Francisco, CA	Viacom Cablevision	60,554
24	Flint, MI	Comcast	59,798
25	Baton Rouge, LA	Daniels & Associates	57,900
26	Monterey, CA	Western Communications	57,600
27	Buffalo, NY	Minneapolis Star Tribune	56,204
28	Jefferson Parish, LA	Cox Cable	55,873
29	Santa Barbara, CA	Cox Cable	55,208
30	Allentown, PA	Twin County Cable	55,000
31	Columbus, OH	Warner Amex Cable	54,000
31	Wichita, KS	Multimedia Cablevision	54,000
33	Melbourne, FL	ATC	53,600
34	Memphis, TN	ATC	52,200
35	Snohomish County, WA	Viacom Cablevision	51,722
36	Jacksonville, FL	ATC	51,450
37	Harrisburg, PA	Sammons Communications	51,091
38	Binghamton, NY	NewChannels	50,543
39	El Paso, TX	Teleprompter	50,300
40	Sarasota, FL	Storer Cable	49,405
41	Medford, MA	Warner Amex Cable	49,000
42	Louisville, KY	ATC	48,232
43	Canton, OH	Warner Amex Cable	47,000
44	West Hartford, CT	Times Mirror	46,909
45	Seattle, WA	Viacom Cablevision	46,693
46	San Rafael, CA	Viacom Communications	46,466
47	Reading, PA	ATC	46,200
48	San Diego County, CA	Times Mirror	44,461
49	Des Moines, IA	Heritage Communications	44,427
50	West Haven, CT	Storer Cable	43,897
51	Shreveport, LA	ATC	43,725
52	Peoria, IL	General Electric	43,700
52	Eugene, OR	Teleprompter	43,700
54	Pompano Beach, FL	American Cable TV	43,570
55	Akron, OH	Warner Amex Cable	43,000
56	South Bend, IN	Buford	43,887
57	Albany, NY	ATC	42,500
58	Columbus, OH	Coaxial Communications	(6/81) 41,500
59	Spokane, WA	Cox Cable	41,484
60	Birmingham, AL	ATC	41,100
61	New Britain, CT	United Cable	41,071
62	Moline, IL	Cox Cable	40,756
63	Scranton, PA	Vertu Cable TV	39,906
64	Charlotte, NC	ATC	39,350
65	Brookhaven, NY	Rogers UA	39,301
66	Bakersfield/Kern County, CA	Warner Amex	39,300
67	Branford, CT	Rollins Cable Vue	38,800
68	Lincoln, NE	MetroVision	39,000
69	Bridgeport, CT	The Alda Group	38,243
70	Jackson, MS	ATC	38,150
71	Lansing, MI	Continental Cablevision	37,587
72	Winston-Salem, NC	Summit Communications	37,538
73	NW Houston, TX	Warner Amex Cable	37,000
73	Overland Park, KS	TeleCable	37,000
75	Fayetteville, NC	ATC	36,600
76	West Palm Beach, FL	Teleprompter	36,400
77	Springfield, IL	Times Mirror	36,316
78	Deerfield, NY	Harron Communications	(6/81) 36,200
79	St. Petersburg, FL	Teleprompter	36,000
80	Palm Desert, CA	Palmer Communications	35,701
81	Delta area, CA	Viacom Cablevision	35,454
82	Dover, NJ	Sammons Communications	34,995
83	Miami Beach, FL	Storer Cable Communications	34,000
84	Cleveland, OH	Cox Cable	33,765
85	Waterbury, CT	Sammons Communications	33,490
86	Beacon, NY	Colony Communications	33,313
87	Pensacola, FL	Cox Cable	33,188
88	Syracuse, NY	NewChannels	33,038
89	Colorado Springs, CO	Century Communications	33,000
89	Colorado Springs, CO	ATC	33,000
89	Concord, CA	Western Communications	33,000
89	Altoona, PA	Warner Amex	33,000
93	Gainesville/Alachua, FL	Cox Cable	32,763
94	York, PA	Susquehanna Broadcasting	32,760
95	Santa Cruz, CA	Teleprompter	32,700
96	Syracuse, NY	Rogers Cablesystems	32,618
97	Port Arthur, TX	Liberty Communications	(5/81) 32,316
98	Cleveland, OH	Viacom Cablevision	32,207
99	Allentown, PA	Service Electric Cable TV	(1/81) 32,000
99	Reno, NV	Teleprompter	32,000
100	Lancaster, PA	Cable TV Associates	32,000